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Wealthtech Weekly

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By Rob Burgess
Reporter

Which AI tools are you using for work?

When I was at the T3 Conference in Dallas, it was staggering to realize how far AI-powered tools have come. One category in particular that has taken off is note-taking applications. Two of these — Zocks and Jump — have proven especially popular with advisors. This week, I spoke with those who have implemented them.

Have you tried these? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

AI tools Jump and Zocks gain funding and advisor fans

Jump and Zocks have both recently collaborated with independent broker-dealer Osaic and seen growth in their user bases.

- **Wealth in the age of AI: What experts hope for — and what they fear**
  Many see AI as augmenting, not replacing, the work of financial advisors, but experts still have plenty of concerns, from compliance to cybersecurity and more.
- **Flourish deal will give RIAs tools to compete with banks on lending**
  Sora Finance will continue to operate as a standalone offering for roughly 12 months while Flourish develops a combined deposit and lending solution.
- **Coping with brutal Efficiency: How advisors are helping federal workers**

Anger, frustration and uncertainty have reigned as clients who previously felt secure in their positions are suddenly dealing with having everything called into question.

- **A checklist for advisors assisting federal employees**
  For clients facing an unexpected federal job loss, here's five tangible ways financial advisors can provide guidance.

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These are the top 40 regional brokers under 40 in 2025

On average, each advisor on the 40 under 40 regional list this year generated nearly $2.4 million in trailing 12-month production from Oct. 1, 2023, to Sept. 30, 2024.

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